



AMATI

CAPITAL PARTNERS



EXIT READINESS ASSESSMENT

1

STRONGLY
DISAGREE

2

SOMEWHAT
DISAGREE

3

SOMEWHAT
AGREE

4

STRONGLY
AGREE

Score each question with the number that best reflects the answer.

1. You have identified a date when you would like to exit or relinquish control of your business. _____
2. You have calculated a value for your business. _____
3. You have talked with your family about the succession of your business. _____
4. You have a written succession plan in place for your business. _____
5. You have identified a specific successor for your business. _____
6. Your identified successor is motivated and prepared to assume your role in management. _____
7. You have identified who will receive the ownership of the business. _____
8. Senior management is in place to operate your business in the event you are unable to do so. _____
9. If there is more than one owner of your business, then a written agreement is in place to address the transfer of ownership. _____
10. You are not personally liable on a bank debt or to any business creditors. _____
11. You have calculated the death taxes, expenses, and other costs that will occur at your passing. _____
12. Your estate has the liquidity to pay the death-related expenses in the event of your passing. _____
13. Your business has no bank or other debt which becomes due at your passing. _____
14. You have an estate plan that reconciles with your succession plan. _____
15. You have a Power of Attorney that addresses your business. _____



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16. Your business and the rest of your estate can be divided fairly (as determined by you) among your family.

17. The business has a defined dividend policy.

18. No family members wish to own or work in your business.

19. You have a family employment policy.

20. You have a competent team of professional advisers (CPA, attorney, etc.).

21. You have decided how you will transfer ownership of your business, either by gift, sale, or other form of transfer.

22. You have developed your personal goals for after you leave your business.

23. You know how much income/assets you will want before you exit from your business to maintain your lifestyle.

24. There is a consensus among your key stakeholders over the current succession plan.

25. You have an active board of directors involved in the succession of your company.

Total _____